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## ABSTRACT

A faculty evaluation system at the University of Georgia identifies and differentiates meritorious performance of individual faculty members. The evaluation system, which is used for faculty in the Division of Health, Physical Education, Recreation, and Dance (HPERD), incorporates the use of a job description, an annual report of activity, and an evaluation of the performance of that activity in light of the job description. At the beginning of each year, a faculty member and the department head meet to formulate the faculty member's job description for that calendar year. Expectations are discussed and agreed upon in the categories of instruction, research/scholarly activity, and service. At the end of the calendar year, each faculty member submits to the department head an annual report which covers all professional activities accomplished under the aforementioned categories. The Merit Service Committee, elected by the faculty, reviews each report in light of the job description. They then rate the teacher according to an already established numerical rating system. Both the department head and HPERD division head also rate each individual. There are avenues for appeal. The HPERD division head, after receiving salary budgets for the next fiscal year, then assigns a percentage salary increase to each merit rating. Multiple evaluation forms are appended. (JM)

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Faculty Evaluation in the  
Division of HPERD at the  
University of Georgia

by

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Department of Physical Education

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The history of faculty evaluation at the University of Georgia is quite similar to that found at most universities. Prior to the 1970's, faculty evaluation was the responsibility of the administrator and it was performed in a rather informal way. Salary increases were determined by the administrator based upon numerous factors, many of which were unrelated to the evaluation of faculty performance.

The transition in the State of Georgia came about as a result of action by the State Board of Regents. The Regents established a firm commitment toward the concept of merit. Each year salary increase funds were awarded to institutions with specific directives of how much of the money was to be used for merit considerations. Often the merit portion amounted to 2/3 or more of the salary allocations. Schools, colleges, and departments were compelled to establish procedures that could identify and differentiate meritorious performance of individual faculty members.

The system presented here today has evolved over the past six years. Undoubtedly, some adjustments in the system will again be made next year. The system I am presenting today was used in 1982 to evaluate performance in 1981. I have chosen to present this one because I feel it is preferable to the slightly modified system we used this year. I predict that we will probably revert back to the system presented here again next year.

Of the different systems I have used as an administrator at three different institutions, this system is the best I've used. The problems we are experiencing with the system are not procedural or conceptual, but tend to be those problems associated with any type of system which is based upon subjective judgements. However, our faculty feels that the more objective types of evaluation have even greater weaknesses.

The University of Georgia Division of HPERD system incorporates the use of a job description, an annual report of activity, and an evaluation of the performance of that activity in light of the job description.

#### (1) JOB DESCRIPTION

At the beginning of each calendar year, a faculty member and the department head meet to formulate the faculty member's job description for that calendar year. Expectations are discussed and agreed upon in the categories of instruction, research/scholarly activity, and service. If an administrative assignment is to be performed, a fourth category of administration is added. These statements are put into writing under the appropriate category. A percentage of time is also identified on the job description for each category. This percentage represents the amount of time projected for each category in the faculty members assignment over the calendar year. The job description is signed by both the faculty member and the department head.

#### (2) ANNUAL REPORT

At the end of the calendar year, each faculty member submits to the department head an annual report covering the period from January 1st to December 31st. The report covers all professional activities accomplished under the categories of instruction, research/scholarly productivity, service, and administration (if applicable). The faculty member organizes the report sequentially according to the evaluation check-sheet. All activities listed on the job description are reported under the appropriate headings and all activities completed above and beyond the job description are also reported under the appropriate heading under each category. A faculty member with no activity to report under a certain heading will indicate "not applicable." If an activity does not appear to fit under any heading it may be identified and described under "other."

Three copies of the annual report are prepared and copies are given to the Physical Education Department Head, the HPERD Division Head, and the HPERD Merit Service Committee.

#### (3) MERIT SERVICE COMMITTEE

The HPERD Merit Service Committee is elected by the HPERD faculty in the Fall to serve as one source of evaluation. The Committee consists of 4-6 members. It will include at least one person from each of the four ranks (elected by faculty members in that rank). If the elections of four members representing each rank do not give each of the four departments at least one representative, an additional committee member from the absent department shall be elected. If more than one department is unrepresented, the department to be represented by the at-large member will be that depart-

ment which has not been represented on the committee for the longest period of time. Should the election result in an all male or all female committee, an additional member at-large of that sex will be elected. All HPERD faculty participate in the member-at-large elections.

The Merit Service Committee reviews all Faculty Annual Reports and evaluates each activity reported on the evaluation checksheet in light of the job description and the percentage of time assigned to each category. No committee member participates in the evaluation of their own report. The Committee meets and establishes its own operating procedures. They must, however, reach consensus on an overall numerical rating (1-4) for each faculty member and this number is reported to the HPERD Division Head.

#### (4) DEPARTMENT HEAD

The Head of the Physical Education Department independently reviews all Faculty Annual Reports and evaluates each activity reported on the checksheet in light of the job description and the percentage of time assigned to each category. After the evaluations are completed, the department head also assigns an overall numerical rating (1-4) for each faculty member and this number is reported to the HPERD Division Head.

#### (5) HPERD DIVISION HEAD

The HPERD Division Head receives the numerical rating assigned independently by the Merit Service Committee and the numerical rating assigned by the Department Head for each faculty member. When the ratings of these two sources differ, the Division Head also reviews that faculty member's annual report and forms a third opinion. A meeting is then called which includes the department head, the chair of the Merit Service Committee and the Division Head to discuss those cases where the ratings differed. The Division Head arrives at a final decision on each case after consultation occurs in this meeting.

The HPERD Division Head informs each faculty member of their numerical merit rating. The department head schedules a conference with each member of the faculty to go over the checklist and the final merit rating. At this conference, the dialogue includes an interpretation of the evaluation and a discussion of suggestions for improvement for the next year.

#### (6) OVERALL NUMERICAL RATING

The Division of HPERD has fluctuated back and forth between 4 point and 5 point rating scales. Currently, a four point system is used and is defined as follows:

- 1 Rating: Exceptionally meritorious performance and productivity
- 2 Rating: Performance and Productivity beyond the normal expectation as described in the job description
- 3 Rating: Performance of assigned responsibilities and expected services in accordance with the individuals job description
- 4 Rating: Performance below expectation in accordance with the individuals job description

#### (7) RECONSIDERATION

If a faculty member strongly disagrees with the evaluation, they may request a reconsideration. The reconsideration session includes the faculty member, the chair of the Merit Service Committee, the department head, and the HPERD division head. The faculty member presents their case for reconsideration. At the conclusion of the presentation, the faculty member leaves and the three evaluators discuss the reconsideration. A decision is made to retain or change the rating.

#### (8) APPEAL

If the decision is to retain the rating, the faculty member may choose to formally appeal the rating to the College of Education. The appeal is then adjudicated at that higher level.

#### (9) SALARY RAISES

The HPERD Division Head, after receiving salary budgets for the next fiscal year, then assigns a percentage salary increase to each merit rating. That percentage will represent the salary increase for each respective faculty member.



College of Education

Faculty Evaluation

1982-83

Name: \_\_\_\_\_

Budgeted Time:

Department: \_\_\_\_\_

Instruction: \_\_\_\_\_

Date: \_\_\_\_\_

Research: \_\_\_\_\_

Service: \_\_\_\_\_

Administration: \_\_\_\_\_

Job Description

INSTRUCTION:

RESEARCH:

SERVICE:

ADMINISTRATION:

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Copy to: Dean's Office  
Department Head  
Faculty Member

COLLEGE OF EDUCATION

FACULTY EVALUATION

1982-83

|             |                           |                 |           |
|-------------|---------------------------|-----------------|-----------|
| NAME:       | _____                     | BUDGETED TIME:  |           |
| DEPARTMENT: | <u>PHYSICAL EDUCATION</u> | INSTRUCTION:    | <u>75</u> |
| DATE:       | <u>FEBRUARY 10, 1983</u>  | RESEARCH:       | <u>0</u>  |
|             |                           | SERVICE:        | <u>0</u>  |
|             |                           | ADMINISTRATION: | <u>25</u> |

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JOB DESCRIPTION

INSTRUCTION: TEACH 5-6 COURSES IN THE PEB PROGRAM AS ASSIGNED.  
TEACH 1 COURSE IN THE PED PROGRAM AS ASSIGNED.  
TEACH 2 COURSES IN THE PEG PROGRAM AS ASSIGNED.  
ADVISE GRADUATE STUDENTS AS ASSIGNED.  
SERVE ON GRADUATE STUDENT COMMITTEES AS ASSIGNED.  
SUPERVISE INDEPENDENT STUDY PROJECTS.

RESEARCH: PRODUCE SCHOLARLY PUBLICATIONS OR OTHER CREATIVE ACTIVITIES  
APPROPRIATE TO OUR DISCIPLINE AND TO THE MISSION OF THE DEPARTMENT.  
DISSEMINATE THE RESULTS OF THIS WORK TO APPROPRIATE POPULATIONS.

SERVICE: CONSCIENTIOUSLY PARTICIPATE IN MEMBERSHIP AND LEADERSHIP ROLES  
IN THE DEPARTMENT, DIVISION, AND UNIVERSITY AS REQUESTED OR  
AS ELECTED.

ADMINISTRATION: DIVISION DIRECTOR OF FACILITIES PLANNING AND DEVELOPMENT.  
DIRECT THE INTERNSHIP EXPERIENCES FOR THE SPORTS MANAGEMENT  
PROGRAM.

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COPY TO: DEAN'S OFFICE  
DEPARTMENT HEAD  
FACULTY MEMBER

NAME OF FACULTY MEMBER EVALUATED \_\_\_\_\_

A. INSTRUCTION (% TIME ASSIGNED 60 )

1. CLASS PREPARATION
2. DEVELOPMENT
3. MEET CLASSES AS SCHEDULED
4. STUDENT ADVISEMENT
5. INSTRUCTIONAL DEVELOPMENT
6. CURRICULAR DEVELOPMENT
7. STUDENT EVALUATIONS
8. STUDENT THESIS/EXAMINING COMMITTEES
9. GUEST LECTURE OPPORTUNITIES AT UGA
10. EXTERNAL GUEST LECTURE OPPORTUNITIES
11. FACULTY IN-SERVICE PROVIDED/RECEIVED
12. OTHER \_\_\_\_\_
13. SPECIAL RECOGNITION OF TEACHING COMPETENCE

OVERALL EVALUATION FOR TEACHING COMPETENCE

| (1)<br>EXCEPTIONALLY<br>MERITORIOUS | (2)<br>BEYOND NORMAL<br>EXPECTATION | (3)<br>EXPECTED IN<br>ACCORDANCE WITH<br>JOB DESCRIPTION | (4)<br>BELOW EXPECTATION | NOT<br>APPLICABLE |
|-------------------------------------|-------------------------------------|----------------------------------------------------------|--------------------------|-------------------|
|                                     |                                     | X                                                        |                          |                   |
|                                     |                                     | X                                                        |                          |                   |
|                                     |                                     | X                                                        |                          |                   |
|                                     |                                     | X                                                        |                          |                   |
|                                     |                                     |                                                          |                          | X                 |
|                                     | X                                   |                                                          |                          |                   |
|                                     | X                                   |                                                          |                          |                   |
|                                     | X                                   |                                                          |                          |                   |
|                                     | X                                   |                                                          |                          |                   |
|                                     |                                     |                                                          |                          | X                 |
|                                     |                                     |                                                          |                          | X                 |
|                                     |                                     |                                                          |                          | X                 |
|                                     |                                     |                                                          |                          | X                 |
|                                     | XX                                  |                                                          |                          |                   |

B. RESEARCH/SCHOLARLY CREATIVE PRODUCTIVITY (% Time Assigned 30 )

| (1)<br>EXCEPTIONALLY<br>MERITORIOUS | (2)<br>BEYOND NORMAL<br>EXPECTATION | (3)<br>EXPECTED IN<br>ACCORDANCE WITH<br>JOB DESCRIPTION | (4)<br>BELOW EXPECTATION | NOT APPLICABLE |
|-------------------------------------|-------------------------------------|----------------------------------------------------------|--------------------------|----------------|
|                                     |                                     | X                                                        |                          |                |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     | X                                                        |                          |                |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     | X                                                        |                          |                |
|                                     | X                                   |                                                          |                          |                |
|                                     |                                     |                                                          |                          | X              |
|                                     | X                                   |                                                          |                          |                |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     |                                                          |                          | X              |
|                                     |                                     | XX                                                       |                          |                |

OVERALL EVALUATION FOR SCHOLARLY AND CREATIVE  
PRODUCTIVITY

C. SERVICE (% Time Assigned 0 )

1. DEPARTMENT/DIVISION COMMITTEES/GOVERNANCE
2. COLLEGE/UNIVERSITY COMMITTEES/GOVERNANCE
3. SPECIAL CONTRIBUTIONS TO DEPARTMENT/DIVISION
4. APPROPRIATE PROFESSIONAL MEMBERSHIPS
5. ATTENDANCE AT PROFESSIONAL MEETINGS
6. FACULTY IN-SERVICE PROVIDED/RECEIVED
7. SERVICE TO LOCAL ORGANIZATIONS/AGENCIES/  
COMMUNITY
8. SERVICE TO STATE/REGIONAL PROFESSIONAL  
ORGANIZATIONS/AGENCIES
9. SERVICE TO NATIONAL/INTERNATIONAL PROFES-  
SIONAL ORG./AGENCIES
10. EVALUATION/ACCREDITATION TEAM MEMBERSHIP
11. DEPARTMENT/DIVISION ADMINISTRATION
12. OTHER \_\_\_\_\_
13. SPECIAL RECOGNITION OF SERVICE COMPETENCE

OVERALL EVALUATION FOR SERVICE

| (1)                          | (2)                           | (3)                                               | (4)                  |                   |
|------------------------------|-------------------------------|---------------------------------------------------|----------------------|-------------------|
| EXCEPTIONALLY<br>MERITORIOUS | BEYOND NORMAL<br>EXPECTATIONS | EXPECTED IN<br>ACCORDANCE WITH<br>JOB DESCRIPTION | BELOW<br>EXPECTATION | NOT<br>APPLICABLE |
|                              | X                             |                                                   |                      |                   |
|                              |                               | X                                                 |                      |                   |
|                              | X                             |                                                   |                      |                   |
|                              | X                             |                                                   |                      |                   |
|                              |                               | X                                                 |                      |                   |
|                              |                               |                                                   |                      | X                 |
|                              | X                             |                                                   |                      |                   |
|                              |                               |                                                   |                      | X                 |
|                              | X                             |                                                   |                      |                   |
|                              |                               |                                                   |                      | X                 |
|                              |                               |                                                   |                      | X                 |
|                              |                               |                                                   |                      | X                 |
|                              |                               |                                                   |                      | X                 |
|                              | XX                            |                                                   |                      |                   |

D. OTHER (% TIME ASSIGNED 20 )

1. DEPARTMENT/DIVISION ADMINISTRATION

2. PROGRESS TOWARD ADVANCED DEGREES

OVERALL EVALUATION FOR "OTHER"

| (1)                          | (2)                           | (3)                                               | (4)               |                |
|------------------------------|-------------------------------|---------------------------------------------------|-------------------|----------------|
| EXCEPTIONALLY<br>MERITORIOUS | BEYOND NORMAL<br>EXPECTATIONS | EXPECTED IN<br>ACCORDANCE WITH<br>JOB DESCRIPTION | BELOW EXPECTATION | NOT APPLICABLE |
| X                            |                               |                                                   |                   |                |
|                              |                               |                                                   |                   | X              |
| XX                           |                               |                                                   |                   |                |

E. OVERALL EVALUATION

(1) (2) (3) (4)

|  |    |  |  |
|--|----|--|--|
|  | XX |  |  |
|--|----|--|--|

ADMINISTRATOR'S SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

A REVIEW OF THE ABOVE EVALUATION HAS BEEN PROVIDED.

FACULTY SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_